Panel Review - List

Panel Review – List Page

1 Introduction

As a reviewer, your service is very important to the Department of Energy (DOE) Office of Science (SC) and to the research community. We know you are very busy and we appreciate the time it takes to participate in the review process.

The purpose of this document is to provide step-by-step instructions for users to follow to complete a Panel Review.

2 Prerequisites

Before you can complete a Panel Review task, the following criterion must be met:

- You have received an email notification that you have a Panel Review task.

3 Completing a Panel Review

Use the following steps to access and complete the Panel Review.

3.1 Accessing the Panel Review

Use the following steps to access the Panel Review task.

3.1.1 Existing Account

Use the following steps to access the Panel Review task if the user has an existing PAMS account

1. PAMS will send an email notification to the user indicating that DOE has requested his/her participation in a Panel Review. Follow the **Panel Review** link provided in the email. (Figure 1)
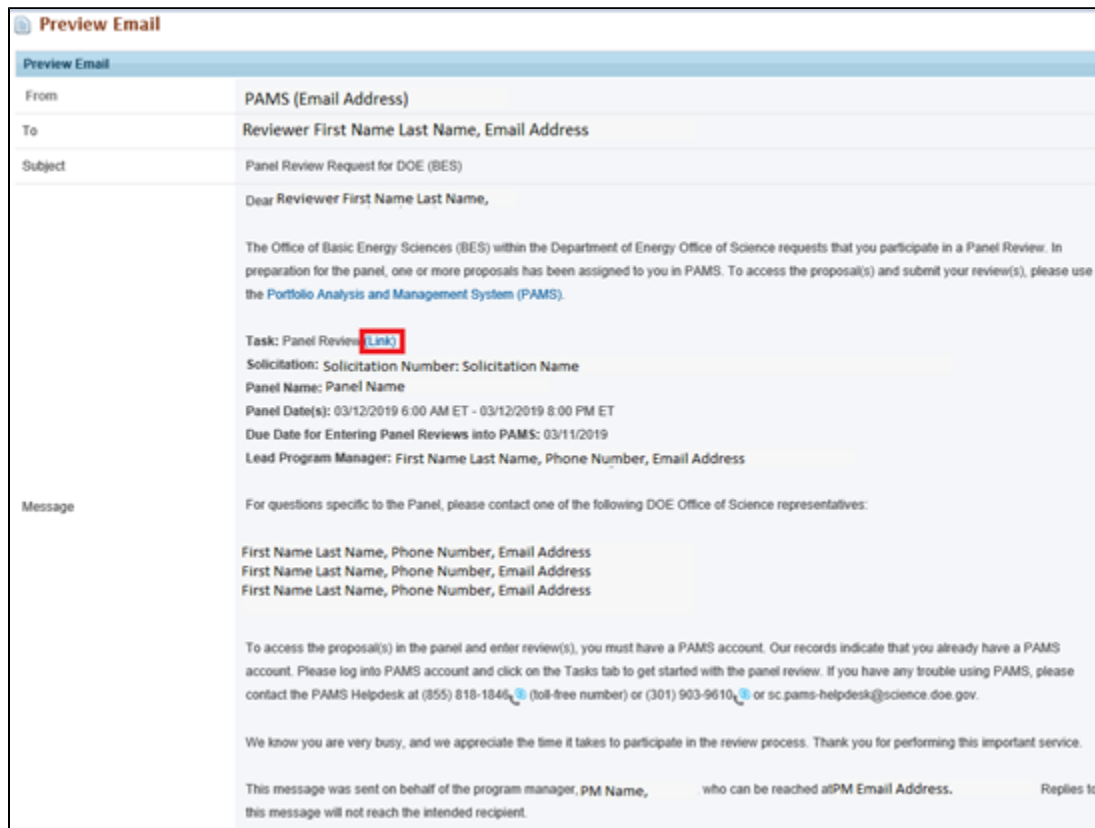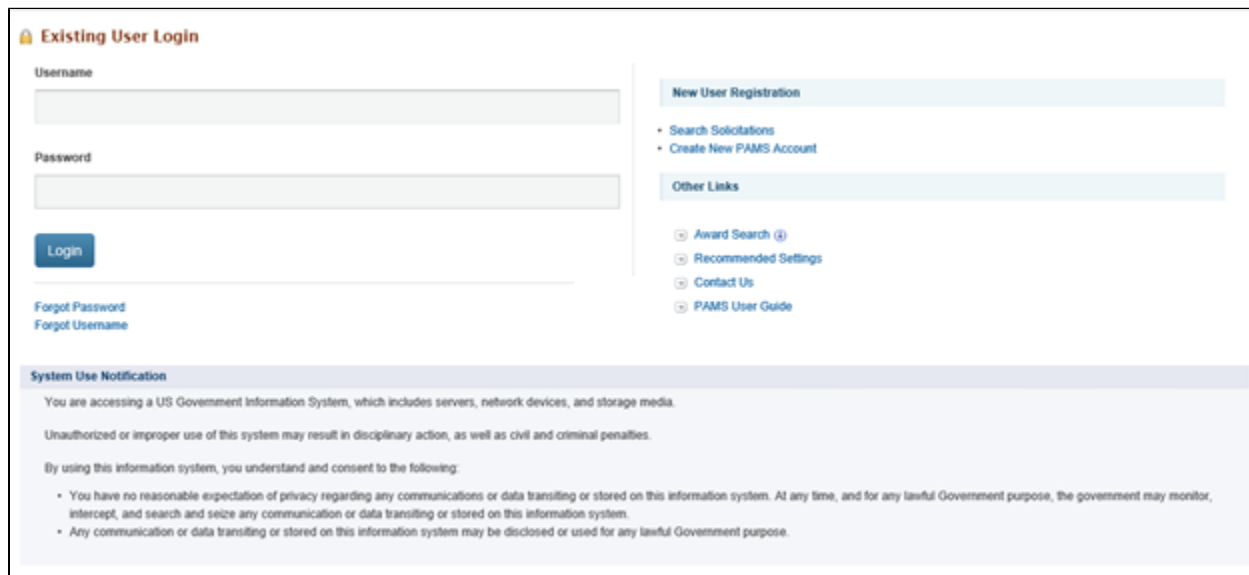
Figure 1. PAMS Panel Review Task Email Notification – Existing Account

OR

Log in to the PAMS external website at: https://pamspublic.science.energy.gov/webpamsepsexternal/login.aspx (Figure 2)

Figure 2. Existing User Login

2. Upon logging in you will navigate to the PAMS Home Page. Click **Review Proposal(s)** under the section entitled Tasks Assigned to you on the left side of your screen. (Figure 3)

Figure 3. PAMS Homepage – Review Proposal(s)

3. Your Pending Tasks will be displayed. To begin your Panel Review click **Start Review** from the Options Column on the right. (Figure 4)

Figure 4. Panel Tasks – List page

3.1.2 No Existing Account

Use the following steps to access the Panel Review task if you do not have an existing PAMS account.

1. PAMS will send you an email notification indicating that DOE has requested your participation in a Panel Review, and provide a registration link and code. Click the **PAMS** (Figure 5)

To:	Prospective Reviewer
CC:	
From:	PAMS
Subject:	Panel Review Request for DOE [Program Office Acronym]

Me s s a g e:	Dear [Reviewer Prefix] [Reviewer First Name] [Reviewer Last Name], The [Program Office] [Program Office Acronym] within the Department of Energy Office of Science requests that you participate in a Panel Review. In preparation for the Panel, one or more proposals has been assigned to you in PAMS. To access the proposal(s)[and submit your review(s)] <NOTE: Message optional depending on role of reviewer in the panel>, please use the Portfolio Analysis and Management System (PAMS). For questions specific to the Panel, please contact one of the following DOE Office of Science representatives: [POC First Name] [POC Last Name], [POC's Phone Number] [POC's Email] <NOTE: List all separated by new line> Task: Panel Review Solicitation: [Solicitation Number], [Solicitation Title] Panel Name: [Panel Name] Panel Date(s): [Panel Start Date] [Panel Start Time] - [Panel End Date] [Panel End Time] Due Date for Entering Panel Reviews into PAMS: [Panel Review Due Date] Lead Program Manager: [Proposal Group Lead PM Prefix] [Proposal Group Lead PM First Name] [Proposal Group Lead PM Last Name], [Proposal Group Lead PM's Phone Number], [Proposal Group Lead PM's Email] <NOTE: If prefix isn't present, then use Last Name, First Name format.> To access the proposal(s) in the panel[and enter review(s)] <NOTE: Message optional depending on role of reviewer in the panel>, you must have a PAMS account. Our records indicate that you do not yet have a PAMS account. Please register in PAMS using the link and registration code provided below to create your account. URL: PAMS Registration Code: [Registration Code] The first time you access PAMS, you must use the URL and registration code provided above or you will not be connected to this proposal review task. For subsequent logins, you may access PAMS using your already established username and password. After logging into PAMS, click on the Tasks tab to get started[with the panel review]. <NOTE: Message optional depending on role of reviewer in the panel> If you have any trouble using PAMS, please contact the PAMS Helpdesk at [PAMS Helpdesk Phone Number] or [PAMS Helpdesk Email]. We know you are very busy, and we appreciate the time it takes to participate in the review process. Thank you for performing this important service. This message was sent on behalf of the program manager, [PM Prefix] [PM First Name] [PM Last Name], who can be reached at [PM's Email]. Replies to this message will not reach the intended recipient.

Figure 5. Request to Review DOE Proposal – No Existing Account

2. Enter the registration code on the Verify Registration Code page, and click **Verify** in the bottom right corner of the page. (Figure 6)

Figure 6. Verify Registration Code Page

3. Complete the account creation process. (See How To Guide – Create External Account)

4. Begin at Step 2 in section *1.1 Existing Account* to access the Panel Review after creating the account.

3.2 Completing the Conflict of Interest (COI) Declaration Statement

For each review assignment in PAMS, you will be required to complete a Conflict of Interest Declaration Statement before you can proceed to the review. You have three options: "I have no conflict of interest in reviewing the proposal", "I have a conflict of interest in reviewing the proposal", or "I do not wish to review the proposal". Use the following steps to complete the Conflict of Interest Declaration.

1. You will be presented with the Panel Review Page (Figure 7). The proposals in the panel are displayed in three sections (you may not have proposals in each section):

a. **Proposal Assignments Accepted** – All assignments for which you have declared no Conflict of Interest.

b. **Proposal Assignments waiting to be accepted** – All review tasks you have been assigned and not yet completed the Conflict of Interest statement.

c. **Other Proposals** – Proposals in the panel for which you have access but are not assigned.

2. To begin your Panel Review click **Accept/Reject Assignment** in the Proposal Assignments waiting to be Accepted section of the page. (*Figure 7*)

Note	Reviews may be assigned to you in various categories: Primary, Secondary, Tertiary, or Additional.

Figure 7. Verify Registration Code Page

3. You will be presented with the Proposal Review – Conflict of Interest Certificate upon accessing the review. You may view the Proposal Abstract to help determine if you have a Conflict of Interest. To do so, click the **Proposal Abstract** link (*Figure 8*).

Figure 8. Proposal Review – Conflict of Interest Certificate – Public Abstract

4. Read the **Information on Conflict of Interest** and **Information on Confidentiality** thoroughly to ensure that you have no conflicts of interest with the information provided. (Figure 9)

Figure 9. Proposal Review – Conflict of Interest and Confidentiality Certificate

5. PAMS will present you with three options at the bottom of the page. Select the radio button next to the appropriate option (Figure 10):

a. **I have no conflict of interest in reviewing the proposal**. Select this option if you do not have any of the conflicts listed in the Conflict of Interest statement, and you would like to proceed with the review.

b. **I have a conflict of interest in reviewing the proposal**. Select this option if you have a conflict of interest with some aspect of the proposal. Selection of this option will close the review task for you and notify the PM.

c. **I do not wish to review the proposal**. Select this option if you do not have a Conflict of Interest but do not wish to review the proposal. Selection of this option will close the review task and notify the PM.

6. Although not required you can enter any comments that you want relayed to the Program Manager via email. (Figure 10)

7. Once you have made your Conflict of Interest designation click **Save and Continue** at the bottom of the page to proceed. (Figure 10)

Figure 10. Proposal Review – Conflict of Interest Certification, Complete COI Statement

Note	If you declared a Conflict of Interest or declined to review the proposal by accident, contact the PM to have the task reopened for you.

8. If you did not declare a Conflict of Interest and later find that you do have a Conflict of Interest, you can declare your conflict from the **Resources** header by clicking the **Additional** tab and selecting **Conflict of Interest**. (Figure 11)

Figure 11. Resources Header – Additional – Conflict of Interest

9. This will take you to the Conflict of Interest page. Your original declaration will be selected, but you may change that selection to "I have a conflict of interest with reviewing this proposal." (Figure 12)

Figure 12. Conflict of Interest Certification – Change Designation

10. Click **Save and Continue** when you are finished. This will remove the review task from your tasks list.

Note	Once you have selected "I have no Conflict of Interest in reviewing this proposal" you cannot select "I do not wish to review this proposal". If you wish to decline to review the proposal contact the Program Manager that asked you to review.

3.3 Completing the Review

Use the following steps to enter your comments and complete the review.

1. If you indicated no Conflict of Interest with the proposal, you will be directed to the reviewer instructions. Read the instructions carefully, and click **Continue** when you are ready to proceed (*Figure 13*).

Figure 13. Proposal Review – Instructions to Reviewers

2. PAMS will redirect you to the Proposal Review – Update Review page, where you will be shown the evaluation criteria for the review. You may enter your comments and scores (if applicable) directly on this page.

3. To access the full proposal, expand the Resources section of the page and click the **Proposal** (Figure 14). You will be prompted to open the proposal PDF.

Figure 14. Proposal Review – Update Review, Access Full Proposal

Note	• When a reviewer downloads a Proposal PDF, PAMS will display a "Proposal Downloaded" overlay message stating that the reviewer is obligated to keep this Proposal under strict confidence, not to share it with anyone, and to destroy any personal copies after completing the review process. PAMS will send an email when the review process ends reminding the reviewer to destroy any personal copies of the Proposal PDF. • This page will Autosave every 10 minutes. If you wish to save more frequently, click the **Save** button in the bottom right corner of the page. • You may also save your work and return at a later time by clicking **Save** and then navigating away from the page or logging out of your session. To return to the review task, access your tasks list and click **Edit Review** to return to the review page.

4. PAMS will redirect you to the Proposal Review – Update Review page, where you will be shown the evaluation criteria for the review. You may enter your comments and scores directly on this page. (Figure 15)

Figure 15. Proposal Review – Save, Save and Submit

Note	• Not all Review Tasks will look the same. Review criteria may differ, you may or may not be required to enter comments or scores. • Do not enter scores into the comment box or reference the scores in your comments.

5. Once you have completed all evaluation criteria and would like to submit your review, click the **Save and Submit** button in the bottom right corner of the page. (Figure 15)

6. PAMS will load the Proposal Review – Review Summary page, which displays a read-only copy of the evaluation criteria and your responses. Review the page carefully. When you are ready, confirm your submission by clicking **Confirm** in the bottom right corner of the page. (Figure 16)

Figure 16. Overall Summary of the Proposal, Email Myself a Copy, Confirm

7. You will receive a green Success message indicating that your proposal review was submitted successfully. The Panel Review task will remain in your tasks list until the PM closes the panel.

Figure 17. Overall Summary of the Proposal, Email Myself a Copy, Confirm